



# HOW TO CHANGE YOUR ANNUITY SAVINGS ACCOUNT ASSET ALLOCATION

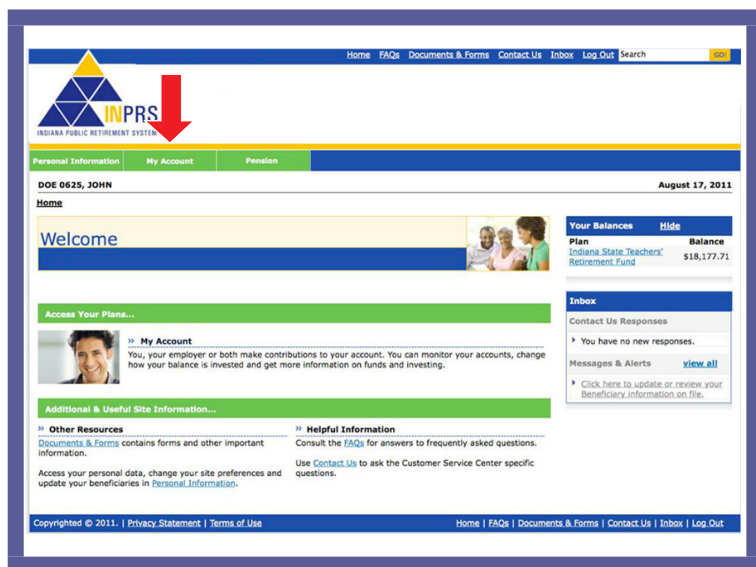
INDIANA PUBLIC RETIREMENT SYSTEM

The screenshot shows the IN.gov homepage with various government service links at the top. The main content area features the 'Indiana Public Retirement System' banner. On the left, a sidebar menu includes 'My Fund', 'Employers', 'Retirement Education', 'Forms', 'About Us', 'Publications', 'Process events', 'Investing', and 'Contact Us'. A red arrow points to the 'MEMBER LOGIN' button. The main area also has a 'SIGN UP FOR MEMBER E-NEWSLETTER' button and a list of links for retirement information.

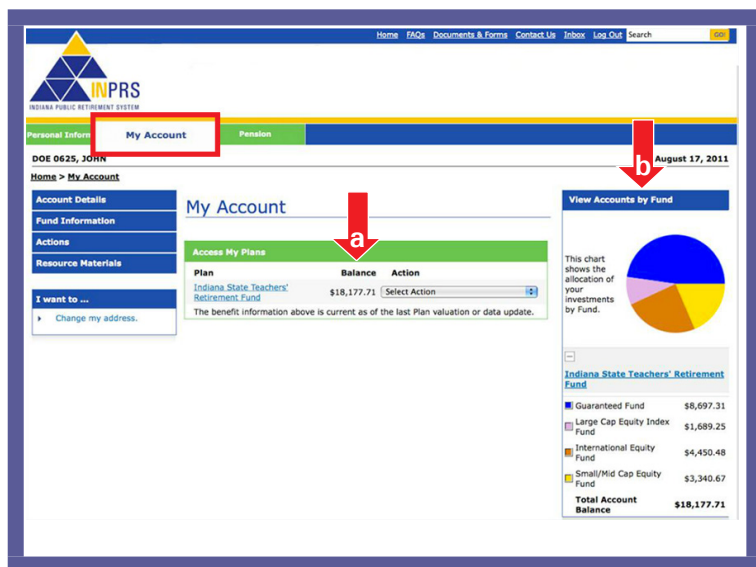
To make changes to your Annuity Savings Account investment allocation, go to [www.inprs.in.gov](http://www.inprs.in.gov) and click Member Login on the left side.

The screenshot shows the INPRS login page. It includes the INPRS logo and a 'Welcome' message. There are links for 'Forgot Your User ID?' and 'Forgot Your Passcode?'. The login form has fields for 'User ID' and 'Passcode', and a 'Login' button. A red arrow points to the 'Login' button. Below the login form, there is a 'NOTE' section and a footer with copyright information.

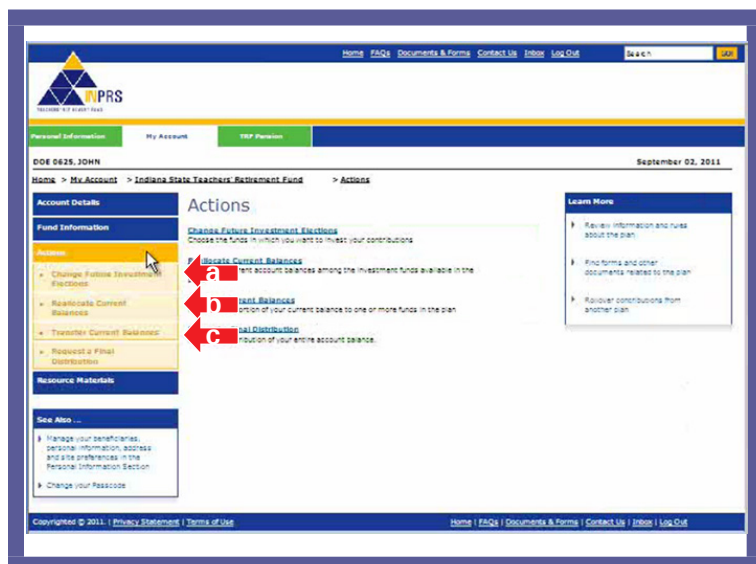
Enter your User ID and Passcode that were mailed to you. Click login to access the site.



From the home page, select the My Account tab to access your account management tools.

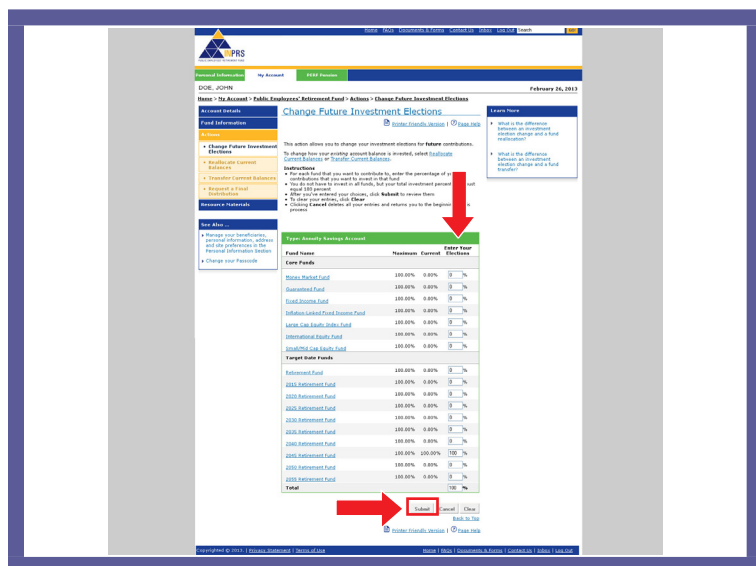


- You can view your current account balance from the My Account tab. Your balance is updated daily to reflect market changes.
- A snapshot of how your account is invested. The pie chart shows the allocation of your investments by fund.



Click Actions on the left side of the My Account tab gives you three options for changing your asset allocation:

- Change future investment elections (current allocations remain)
- Reallocate current balances (redistributes entire balance among the funds)
- Transfer current balances (moves individual fund balances from one fund to another – future contributions are not affected)



Enter a percentage of your future contributions that you wish to invest in a particular fund in the Enter Your Elections column to change future investment elections.

Click **Submit** and **Confirm** to complete the transaction.\*

\*Transactions made on holidays will not be effective until the next business day. You will receive a confirmation. Please keep it for your records.



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INDIANA PUBLIC RETIREMENT SYSTEM

**Reallocate Current Balances**

This action allows you to reallocate your existing account balance among available investment funds in the Public Employees' Retirement Fund. To move only a portion of your eligible balance from one fund to another, you should select [Transfer Current Balances](#). To change the way that your future contributions are invested, select the [Change Future Investment Elections](#) action.

**Instructions**

- Enter the percentage of your existing account balance you would like to invest in each available investment fund.
- You do not have to invest in all funds, but your total invested must equal 100 percent.
- After you've entered your choices, click **Submit** to review them.
- To clear your entries, click **Clear**.
- Clicking **Cancel** deletes all your entries and returns you to the beginning of this process.

**Select Reallocation Options**

Reallocation Option: Annuity Savings Account  
Balance Available: \$2,133.13

Valid Funds	Maximum	Current	New
Core Funds			
Money Market Fund	100.00%	0.00%	0 %

**Reallocating current balances:** Enter the percentage of your existing balance that you wish to invest in any available funds.

**Reallocate Current Balances**

Balance Available: \$18,177.71

Valid Funds	Maximum	Current	New
Core Funds			
Guaranteed Fund	100.00%	47.83%	50 %
Fixed Income Fund	100.00%	0.00%	50 %
International Equity Fund	100.00%	0.00%	0 %

**Microsoft Internet Explorer provided by ACS, Inc.**

<https://test2.benefitsweb.com/benefitsweb/DCFundReallocationsShowImage.jsp>

**50.00% - Guaranteed Fund**  
**50.00% - Fixed Income Fund**

Total: 100.00%

Model Changes Submit Cancel Clear

You can model your new allocations before completing the transaction by viewing them as a pie chart.

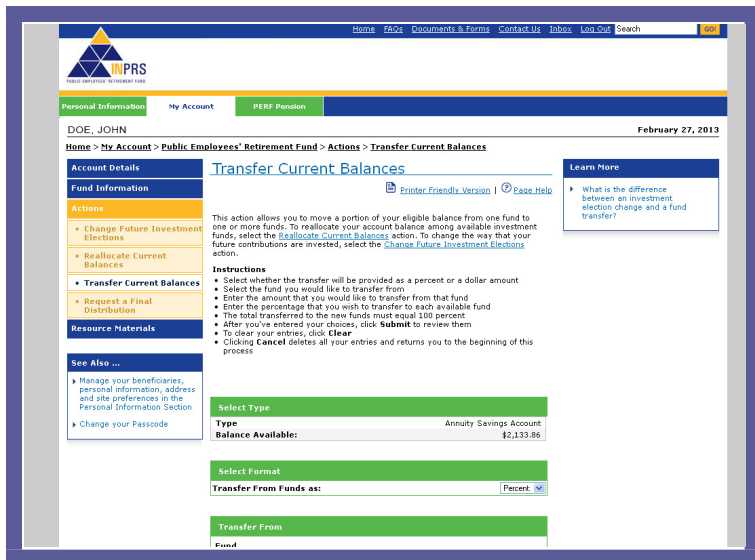
Click **Submit** and then **Confirm** to finalize the reallocation.\*

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# HOW TO CHANGE YOUR ANNUITY SAVINGS ACCOUNT ASSET ALLOCATION

INDIANA PUBLIC RETIREMENT SYSTEM



Home > My Account > Public Employees' Retirement Fund > Actions > Transfer Current Balances

February 27, 2013

**Account Details**

**Transfer Current Balances**

This action allows you to move a portion of your eligible balance from one fund to one or more funds. To reallocate your account balance among available investment funds, select the [Reallocate Current Balances](#) action. To change the way that your future contributions are invested, select the [Change Future Investment Elections](#) action.

**Instructions**

- Select whether the transfer will be provided as a percent or a dollar amount.
- Select the fund you would like to transfer from.
- Enter the amount that you would like to transfer from that fund.
- Enter the percentage that you wish to transfer to each available fund.
- The total transferred to the new funds must equal 100 percent.
- After you've entered your choices, click **Submit** to review them.
- To clear your entries, click **Clear**.
- Clicking **Cancel** deletes all your entries and returns you to the beginning of this process.

**Select Type**

Type: Annuity Savings Account

Balance Available: \$2,133.86

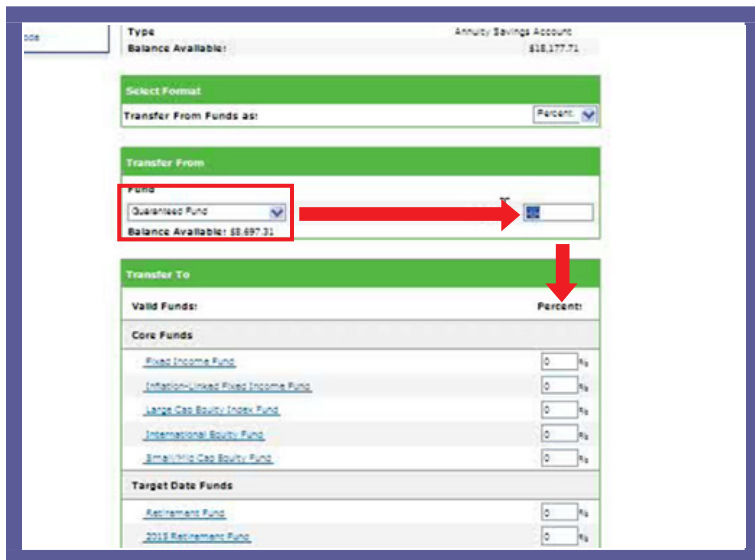
**Select Format**

Transfer From Funds as: Percent

**Transfer From**

Fund:

Transferring current fund balances: select the fund you would like to transfer money from (see image below), then enter the percentage or dollar amount you wish to transfer and the fund you would like to receive the transfer.



Type: Annuity Savings Account

Balance Available: \$18,177.71

**Select Format**

Transfer From Funds as: Percent

**Transfer From**

Fund: Qualified Fund

Balance Available: \$5,697.31

**Transfer To**

Valid Funds: Percent:

**Core Funds**

Fixed Income Fund	0%
Inflation-Linked Fixed Income Fund	0%
Large Cap Equity Index Fund	0%
International Equity Fund	0%
Small/Mid Cap Equity Fund	0%

**Target Date Funds**

Retirement Fund	0%
2018 Retirement Fund	0%

Click **Submit**, then **Confirm** to complete the transfer.\*

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For additional information regarding PERF Online and TRF Interactive, please review the demo [Your Guide to INPRS](#). You may also contact the Customer Service Center for assistance toll-free at (888) 526-1687 for PERF or (888) 286-3544 for TRF, Monday through Friday, 8 a.m. to 8 p.m. EST.